Who’s Responsible for Whom?

Office of Human Resources Centralized On-Boarding:
1. Benefited Employees
2. Post Doctoral Fellows
3. Graduate Students on Contract

HR Liaisons Departmental Responsibility:
1. Miscellaneous Wage Employees
2. Supplemental Faculty and Supplemental Professionals
3. Undergraduate Students
4. Graduate Student Labor(not on Contract)
5. Non-Paid Employees(Adjuncts)
What can rehires do before their On-Boarding session with HR?

1. Review the Welcome Packet
2. Complete the following forms:
   a. Employee Demographic Data Form (EDD)
   b. W-4 Form
   c. Direct Deposit Form
   d. Bayh-Dole Act-Agreement to Assign
   e. I-9 (Employee portion)
3. Collect documentation as described on the Checklist
4. Prepare any questions for HR

Foreign Nationals must go to the Office for International Students & Scholars upon arrival for I-9 processing
What will happen in HR?

1. Rehire should arrive promptly at scheduled On-Boarding time.

2. If EDD, W-4 or Direct Deposit are not completed, rehire should use an available KIOSK to complete forms.

3. Meet with the On-Boarding Coordinator to complete hiring documents.

4. Foreign Nationals must also meet with the Foreign National Coordinator to verify visa and residency status.

5. Benefited employees will meet with the Benefits Coordinator.
The link for this web page will be included in the rehire’s Welcome Packet.

The website also contains additional information for HR Liaisons.
• HR Liaisons will need to complete and return this form to HR before the date of rehire.

• This form contains information that HR Liaisons use to complete on the HR Job Data. In order for HR to complete the HR Job Data this information is required.
• The link to the menu page will be included in the Welcome Packet for rehires if they wish to complete this at home. We will also make this the home page on the kiosks in Human Resources.

• A rehire will begin by selecting “Log in with your UD ID and Pin”.

• The link on the menu page will take the rehire to the CAS Login Screen.

• A rehire does not need to complete the Quick Bio because the rehire’s information is in PeopleSoft HR.
The rehire will need to enter their UD ID and their pin. Once they have entered their ID and pin and selected Submit, they will return to the menu page.

If the rehire does not remember either their UD ID or their pin, they need to contact HR at x8677.
- The next step is for the rehire to “Tell Us About Yourself”. This link will take the rehire to the Employee Demographic Data Form (EDD).
- The EDD is the same form for both NEW and EXISTING employees.
The first page of the EDD requires the rehire to enter their Employee ID which is their UD ID and their Student ID.
• The second page will have fields populated with information that is in Peoplesoft such as address. The fields are editable if the rehire notices an error or needs to make a change to their information.
The third page will have fields populated with information that is in Peoplesoft such as date of birth and gender.
On the fourth page, the rehire needs to update their Highest Education Level and school information if applicable. This information will update Peoplesoft in Human Resources.

If a rehire does not remember what information UD has on record, they can select the link “View education currently on record”. This will take them to the CAS Login Screen so they can login to Web Views. This feature is available on the next several pages of the EDD.

Note: If an unknown school is chosen, you must enter the actual name of the school in the comments of the EDD form.
To login to Web Views the rehire will need to enter their UD ID and their pin.

Use this section to log in with your new UD ID and PIN. Visit the ‘Need help?’ link for more information.

NOTE: Some systems may not be available between approximately 1:00 a.m. and 1:30 a.m. Monday - Saturday and between 4:30 a.m. and 5:00 a.m. on Sundays due to system maintenance.
• The EDD View shows the rehire the information that HR has on file. If there is information missing or information that is incorrect, the rehire will need to complete the appropriate sections of the EDD Web Form.
On the fifth page, the rehire has the opportunity to enter language information. This information is not required, but if entered will update Peoplesoft in Human Resources and Grants.
On the sixth page, the rehire has the opportunity to enter licenses and certificates. This information is not required, but if entered will update Peoplesoft in Human Resources.
• On the seventh page, the rehire can enter any honors and awards. This information is not required, but if entered will update Peoplesoft Grants.
On the eighth page, the rehire has the opportunity to enter any membership information. This information is not required, but if entered will update Peoplesoft in Human Resources and Grants.
On the ninth page, the rehire has an opportunity to enter publication information. This information is not required, but if entered will update Peoplesoft Grants.
On the tenth page, the rehire has the opportunity to enter information regarding lectures. This information is not required, but if entered will update Peoplesoft Grants.
On the eleventh page, the rehire can enter collaborations. This information is not required, but if entered will update Peoplesoft Grants.
On the twelfth page, the rehire has the opportunity to enter prior work experience. This information is not required, but if entered will update Peoplesoft in Human Resources and Grants.
On the thirteenth page, the rehire can enter keywords. This is not required, but if entered will update Peoplesoft Grants.
On the fourteenth page, the rehire can enter information regarding advisors and advisees. This information is not required, but if entered will update Peoplesoft Grants.
• On the fifteenth page, the rehire can enter information on the Experts page. This is not required, but if entered will update the Experts Database used by the Office of Communications & Marketing.
On the sixteenth page, the rehire will select Finish & Submit. Rehires completing the Employee Demographic Data form will be routed directly to HR. Changes for existing employees will continue to be routed through the employee’s supervisor as they are today.
• The rehire is now at their web forms In Basket and in order to return to the Main Menu, they need to close the window by selecting the “X” in the top right hand corner.
You will notice that a check mark appeared next to “Tell Us About Yourself” to indicate that the Employee Demographic Data form has been completed.

The next step is for the rehire to complete their W-4.
The W-4 will be populated with the information currently in Peoplesoft. This form must be completed by the rehire.
The W-4 displays the Date of the Last Change and the current tax elections. The form has a field asking for the date the change will take effect.

If the Date of Last Change is prior to today’s date, the effective date on the W-4 must be today’s date plus at least one day. For example, if the Date of Last Change is December 31, 2009, my W-4 effective date must be today plus at least one.

If the Date of Last Change is a future date, the effective date on the W-4 must be the Date of Last Change plus at least one day. For example, if the Date of Last Change is August 1, 2010 my W-4 effective date must be August 2, 2010 or later.
Note: There is an online link to a W-4 Tax Worksheet to help the employee determine their exemptions.
• This form includes an electronic signature feature titled Certification. The employee must agree to the certification by choosing “I agree” from the drop down box and then must type their name as it appears at the top of the form.

• Standard web form routing gives one the ability to add additional approvers. Additional approvers are NOT required for the W-4.

• After selecting Finish and Submit, the rehire will need to close the W-4 window by selecting “X” in the top right corner to return

Certification: * Choose an option for certification under perjury and provide your first and last name to electronically sign your W-4 certificate.

I certify under penalty of perjury that the number of withholding exemptions claimed on this electronic document does not exceed the number to which I am entitled.

I agree:

First name: Jane
Last name: Doe
Once Payroll has approved the W-4 and the employee has received their copy, a printer friendly version is available.
You will now notice that a second check mark appeared beside the W-4 to indicate that it has been completed.

The rehire can now complete the Direct Deposit form by selecting “Specify Your Payroll Deposit Account.”
The Direct Deposit will be populated with the information currently in Peoplesoft. **This form must be completed by the rehire.**

There is now the capability to add an attachment of your bank documents to the Direct Deposit form.

Note: If a bank is not currently on file with Payroll, the employee will need to contact Payroll.
• The change Direct Deposit displays the Date of the Last Change and the direct deposit information. The form has a field asking for the date the change will take effect.

• If the Date of Last Change is prior to today’s date, the effective date on the Direct Deposit must be today’s date plus at least one day. For example, if the Date of Last Change is December 31, 2009, my Direct Deposit effective date must be today plus at least one.

• If the Date of Last Change is a future date, the effective date on the Direct Deposit must be the Date of Last Change plus at least one day. For example, if the Date of Last Change is August 1, 2010 my Direct Deposit effective date must be August 2, 2010 or later.
This form includes an electronic signature feature titled Certification. The employee must agree to the certification by choosing “I agree” from the drop-down box and then must type their name as it appears at the top of the form.

Standard web form routing gives one the ability to add additional approvers. Additional approvers are NOT required for the Direct Deposit.

After selecting Finish and Submit, the rehire will need to close the Direct Deposit window by selecting “X” in the top right corner to return to the New Employees Main Menu.
• You will now notice that a third check mark appeared beside the Direct Deposit to indicate that it has been completed.
• The next step on the menu is Additional Tax Withholdings. This is optional, but we would recommend that the rehire should open the additional tax form to check and see if they were withholding additional money when they left the University.
• If the rehire does not choose to have Additional Tax Withholdings, they can proceed to the Bayh-Dole Act Memo.
• The Additional Tax Form will populate with the Additional Tax being withheld when the rehire left the University.

• They can either change the amount and select Finish and Submit or they can select Save & Exit if they do not have any additional tax withholding.

• The rehire will need to close the Additional Tax Withholding window by selecting “X” in the top right corner to return to the New Employees Main Menu.
• You will notice that a check mark did not appear beside the Additional Tax Withholdings. This is due to the fact that the employee did not make any changes to their additional tax withholding and exited the form without saving.

• The next step on the menu is the Bayh-Dole Act – Memo.
The Bayh-Dole Memo defines the federal requirements regarding employees who engage in federally funded research and who must disclose any patentable inventions that have been conceived in connection with their work at the University.

After reading the memo, the rehire needs to select the “X” in the top right hand corner in order to return to the New Employees Main Menu.
There is now a check mark next to the Bayh-Dole Act Memo to indicate that the memo has been opened and read.

The next step is for the rehire to print and then sign the Bayh-Dole Act – Agreement to Assign. The rehire must bring this form to Human Resources.
The Bayh-Dole Act - Agreement to Assign states that the employee must disclose inventions conceived while doing sponsored projects at UD. All employees must print and then sign this form.

After printing the form and signing it, the rehire needs to select the “X” in the top right hand corner in order to return to the New Employees Menu.

If the rehire is on-boarded by HR, the form must be brought by the rehire to HR. If the rehire is on-boarded by the department, the form must be brought by the rehire to the department.
There is now a check mark next to the Bayh-Dole Act – Agreement to Assign.

The next step is for the rehire to print and then sign the I-9. The rehire must bring this form to Human Resources.
Rehire On-Boarding

- “The I-9 form documents that a rehire (both citizen and noncitizen) hired after November 6, 1986, is authorized to work in the United States.”
- All Foreign Nationals must go to the Office for International Students & Scholars upon arrival for I-9 processing.
- If the rehire is a US Citizen, they must bring their I-9 form with the employee section completed to their onboarding appointment.
- After printing the form, completing the employee section and signing it, the rehire needs to select the “X” in the top right hand corner in order to return to the New Employees Menu.
If the rehire has completed these forms prior to arrival at UD, the forms will “wait” in a holding tank until an HR representative approves them. This could be the On-Boarding Coordinator at a scheduled session or the HR Analyst after a department has submitted the Job Data Form. It will depend on what type of employee is being hired.
HR JOB DATA (JED)

Old World → New World
The Action that will need to be chosen is Rehire.
If the Employee Group selected is Grad on Contract, a new field will appear. The Req ID of the graduate contract web form when entered will link to the Grad Contract and Grad Funding Forms to provide the contract dates and funding information for the rehire.
• For I-9, when yes is chosen, a field called I-9 Date will appear and must be completed.

• An international rehire will go to the Office for International Students & Scholars to complete their I-9 paperwork. OISS will send completed I-9s to HR on a daily basis.

• For working papers, if yes is chosen a field called Working Papers Date will appear and must be completed.

• You must select a radio button for Position number or for Job Code. Once you have selected the appropriate button, a secondary field will appear. You must enter a corresponding Position number or Job Code.
- Bargaining Unit used to be a yes or no field. Now you must choose an option.
  - UD Chapter AAUP – Full Time Faculty
  - Local 3472 – Members of AFSCME Local 3472
  - Local 43 – Members of AFSCME Local 439
  - None – All other employees
The FICA status field is now a drop down with the options of Subject, Exempt, and Medicare Only. If Medicare Only is selected, proof is required that they are a Federal or Medicare exempt employee. All other rehire employees are Subject.
- There is a new drop down called “Earnings Distribution Type”. The choices in the drop down are By Amount, By Hour, By Percent and None.
- By Amount is for SRGs, Post Doctorate Fellows and Graduates on Contract
- By Hours is for BAFs, AFSCME
- By Percent is not used
- None is used for all other employees
- The Distribution section of the JED is now incorporating the feature of Add Line.
- Step 1: Enter the Earnings Code, SpeedType, Class, User field (if applicable) and the Amount.
- Step 2: Select Add Line.
• Step 3: Enter the Account
- Forms for rehires processed by Human Resources (Benefited, Post Doctoral Fellows and Graduate Students on Contract) will route directly to HR. Forms for all other types of rehires are handled by HR Liaisons and will route through departmental approvers as they do now.
Once the EDD, W-4, Direct Deposit, Additional Tax and JED is approved by HR the information will update Peoplesoft.
If the rehire is a benefited employee they can now return to the New Employees Main Menu to log in.
Only benefited rehires will see the link for the Flexible Spending Account.
Everyone must complete a Flexible Spending Account election before they can enroll in their Flexible Benefits. If the employee wishes to waive FSA, 0 (zero) should be entered in both My Annual Contribution fields.
Rehires will immediately see this confirmation page once they submit their elections.

To return to the main menu they will need to select Exit.
A check mark now appears indicating that the FSA has been completed. The next step is to select Flexible Benefits.
On page one, the rehire can enter their dependents by selecting “Add a new dependent” or they can select next step.
• To add a dependent a rehire must provide Name, Relationship and Date of Birth and then select the link to add the dependent.

• Dependent information currently does not update Peoplesoft and must be manually keyed.
Rehire On-Boarding

Below are your benefit options and Flex Credits. To enroll or to change your benefits complete each section below.

First time enrollees in the Blue Care or Aetna HMO must designate a Primary Care Physician (PCP). Please use the "edit" option to the right of your medical plan elections and the labeled box to the right of covered dependents to designate the PCP selection. The PCP cannot be a physician's name. It must be a six digit code. If you do not know the six digit code for your PCP, please see the link for Aetna or Blue Cross/Blue Shield for instructions and a PCP locator. If you are a current HMO participant, please contact Blue Cross/Blue Shield or Aetna customer service to change or update an existing PCP as these records are maintained by the provider.

<table>
<thead>
<tr>
<th>Options</th>
<th>Employee Only</th>
<th>Employee and Spouse</th>
<th>Employee and Child(ren)</th>
<th>Family</th>
<th>PCP (Required for Blue Care &amp; Aetna HMO)</th>
<th>Current Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>First State Basic</td>
<td>$236.00</td>
<td>$488.43</td>
<td>$358.85</td>
<td>$610.55</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Blue Care</td>
<td>$243.76</td>
<td>$512.28</td>
<td>$372.32</td>
<td>$639.47</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Comprehensive PPO</td>
<td>$260.36</td>
<td>$539.89</td>
<td>$399.91</td>
<td>$674.92</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Aetna HMO</td>
<td>$243.61</td>
<td>$511.03</td>
<td>$372.05</td>
<td>$638.03</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>No Coverage</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your Flex credit equals the cost of First State Basic medical coverage. Flex Credit for NO COVERAGE is $14.59. If you select NO COVERAGE, you must provide proof of other coverage or you will automatically be enrolled in the default plan.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Date of Birth</th>
<th>Medical</th>
<th>Primary Care Physician (PCP)</th>
<th>Current Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ricardo, Ricky</td>
<td>Spouse</td>
<td>04/07/1955</td>
<td>Yes</td>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Options</th>
<th>Employee Only</th>
<th>Employee and Spouse</th>
<th>Employee and Child(ren)</th>
<th>Family</th>
<th>Vision Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Program</td>
<td>$19.60</td>
<td>$39.62</td>
<td>$44.33</td>
<td>$64.43</td>
<td></td>
</tr>
<tr>
<td>No Coverage</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your Flex Credit equals the cost of Dental coverage. Flex Credit for NO COVERAGE is $4.17.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Date of Birth</th>
<th>Dental</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ricardo, Ricky</td>
<td>Spouse</td>
<td>04/07/1955</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Options</th>
<th>Employee Only</th>
<th>Employee and Spouse</th>
<th>Employee and Child(ren)</th>
<th>Family</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision Plan</td>
<td>$3.12</td>
<td>$6.70</td>
<td>$5.05</td>
<td>$9.19</td>
<td></td>
</tr>
<tr>
<td>No Coverage</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Your Flex Credit equals the cost of employee only.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Date of Birth</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ricardo, Ricky</td>
<td>Spouse</td>
<td>04/07/1955</td>
<td></td>
</tr>
</tbody>
</table>
An enrollment section has been added for Blood Bank.
Please note that the Review page includes the FSA elections.

<table>
<thead>
<tr>
<th>Selected Options</th>
<th>Cost of Coverage (per pay)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>$539.89</td>
</tr>
<tr>
<td>Dental</td>
<td>$39.62</td>
</tr>
<tr>
<td>Vision Care</td>
<td>$6.70</td>
</tr>
<tr>
<td>Blood Bank</td>
<td>$0.00</td>
</tr>
<tr>
<td>Employee Life Insurance</td>
<td>$32.48</td>
</tr>
<tr>
<td>Long Term Disability</td>
<td>$19.28</td>
</tr>
<tr>
<td></td>
<td>Flex Benefits Cost: $637.97</td>
</tr>
<tr>
<td></td>
<td>Flex Credit: $573.65</td>
</tr>
<tr>
<td></td>
<td>Flex Benefits Before-Tax Deduction: $64.32</td>
</tr>
<tr>
<td></td>
<td>FSA Healthcare: $0.00</td>
</tr>
<tr>
<td></td>
<td>FSA Dependent Care: $214.29</td>
</tr>
<tr>
<td></td>
<td>Cost of Additional Benefits: $214.29</td>
</tr>
<tr>
<td></td>
<td>Flex Benefits Before-Tax: $64.32</td>
</tr>
<tr>
<td></td>
<td>Total Before-Tax Deductions: $278.61</td>
</tr>
</tbody>
</table>

- If the Total Cost is greater than your Flex Credit, the difference is your Before-Tax Deduction.
- If the Total Cost is less than your Flex Credit, the difference is your taxable Flex Cash.
- If the Total Cost equals your Flex Credit the Net Amount is zero.

Dependent Life Insurance  $20,000 / $8,000  $3.02
After-Tax Deduction: $3.02
• Once Exit is selected, the rehire will return to the New Employees Main Menu.
• Now the employee must turn in any supporting benefit documentation to the Benefits office.
The rehire now must Log Out and the On-Boarding process is now completed!!!!!!
Onboarding Process Completed…

What Does That Mean?

• In the HR system and is ready to be paid
• Access to systems they need to perform their job may be requested
• If they made their benefit elections there will be no delay in coverage
• Ability to go to Public Safety to sign up for a parking permit
• Next day they will have an e-mail account
• Next day the ID system is ready for them to get an ID card
Questions and Contact Information

This presentation is available at [http://www.udel.edu/onboarding](http://www.udel.edu/onboarding)

Let us know how things are going. If you encounter ANY problems, please let us know right away at [hr-onboard@udel.edu](mailto:hr-onboard@udel.edu)